








General Assembly 2013 Maranello, Italy

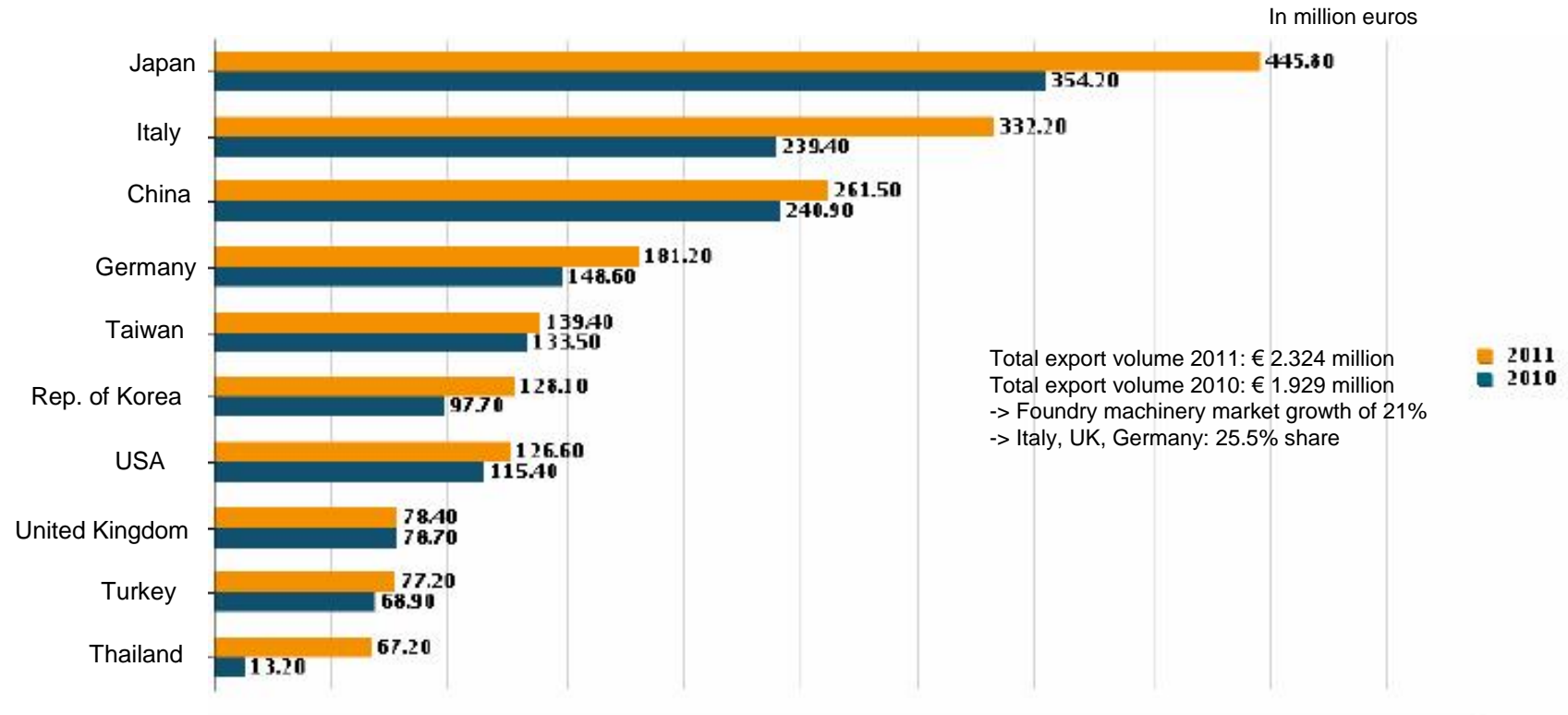
Optimism ante portas?

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List of countries by growth national product

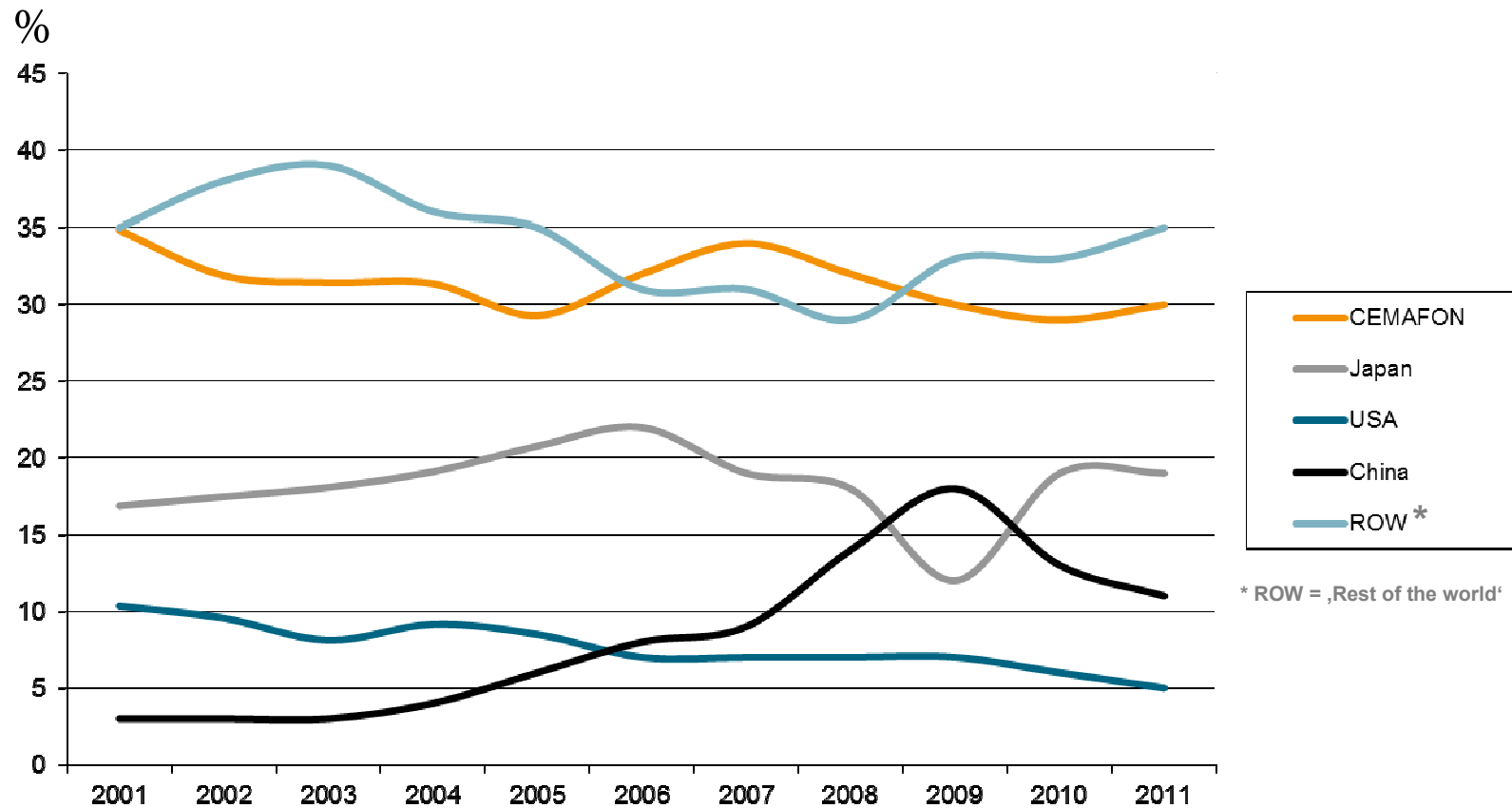
Ranking		Country	GNP in Mio. USD (2012)	Comparison to prior year (real economic growth)
-		European Union	16.584.007	- 0,24%
1		United States	15.684.750	+ 2,21%
2		China	8.227.037	+ 7,80 %
3		Japan	5.963.969	+ 2,00 %
7		Brasil	2.395.968	+ 0,87 %
8		Russia	2.021.960	+ 3,40 %
10		India	1.824.832	+ 3,99 %

World machinery trade – major export nations for foundry machinery 2010 / 2011



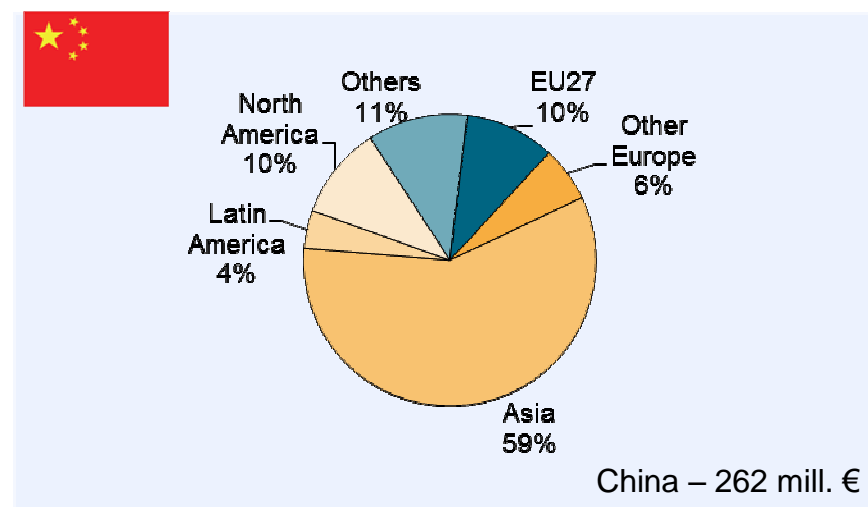
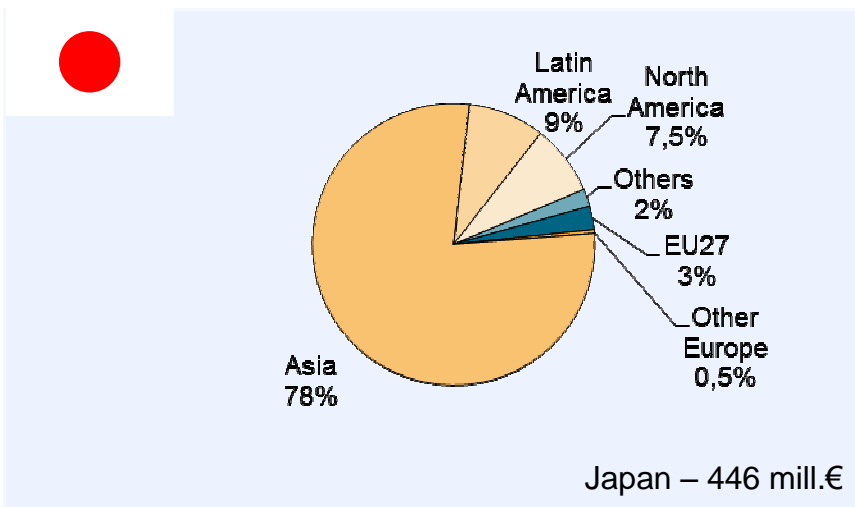
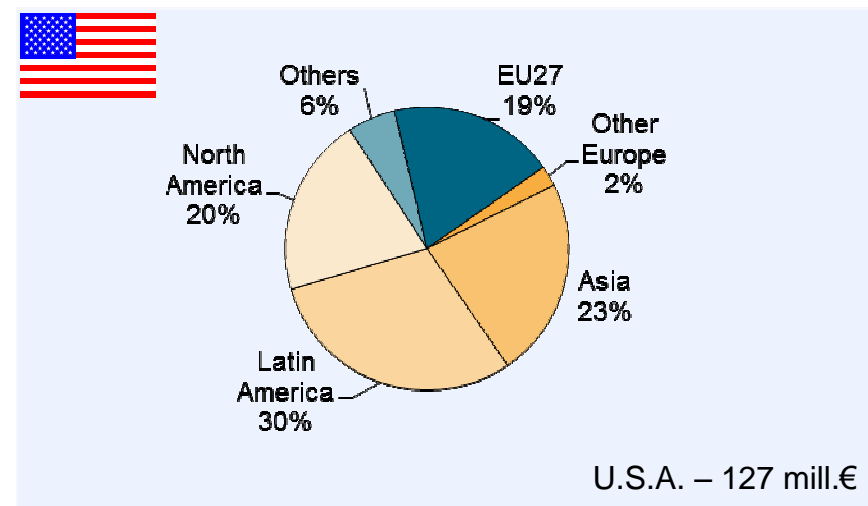
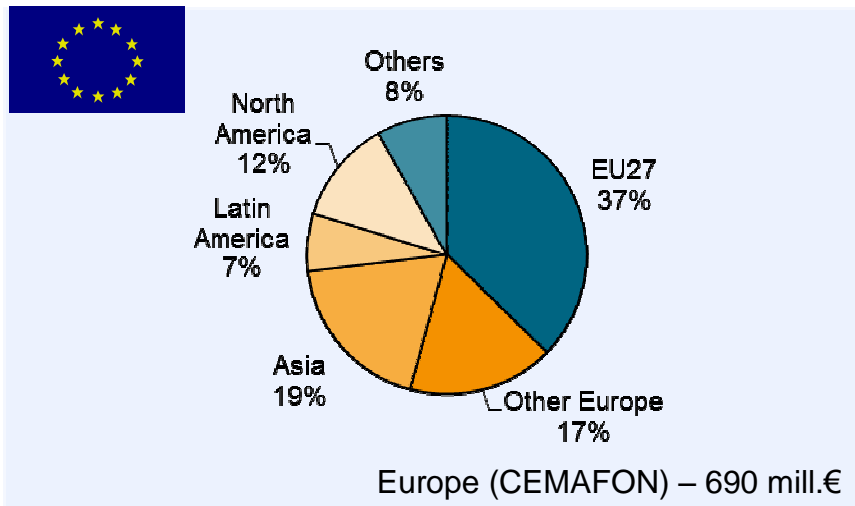
Source: National and VDMA statistics

World market shares of foundry machinery - development 2001 - 2011

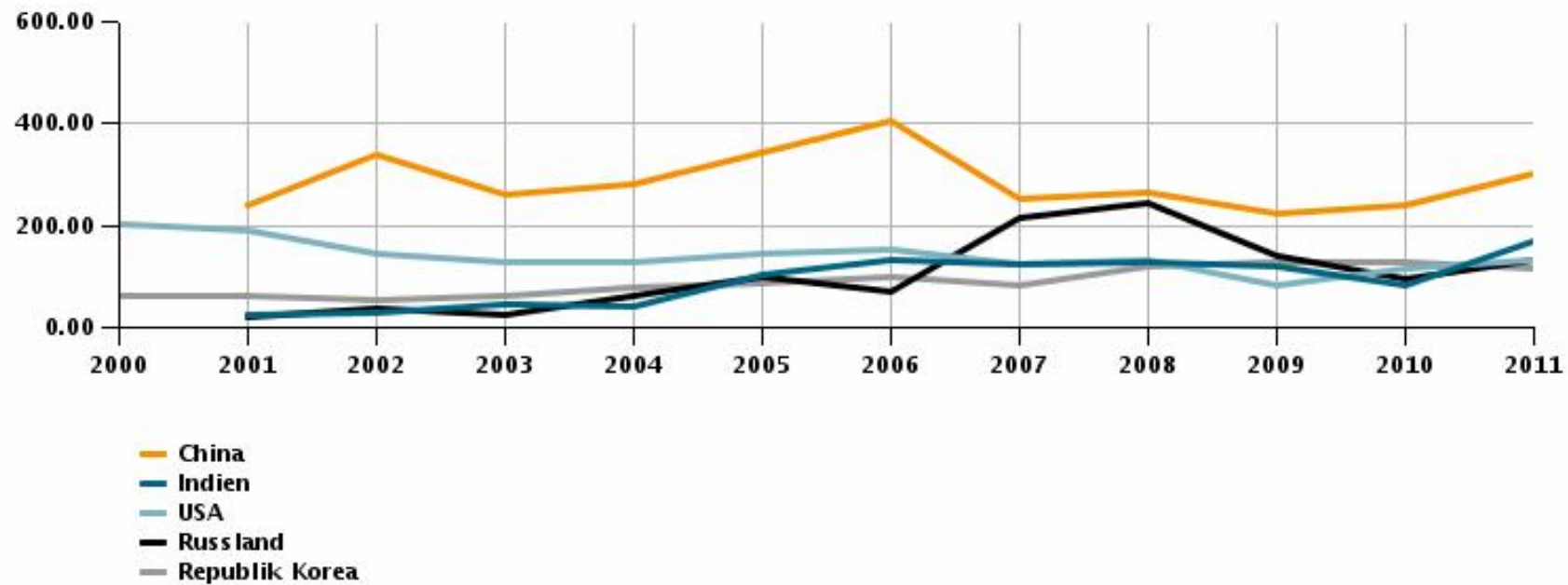


Source: National and VDMA statistics

Export structure CEMAFON, USA, Japan and China 2011



5 biggest importers of foundry machinery development 2000 - 2011



Source: National Statistics, VDMA

Structure of European foundry supplying industry

➤ Estimate* of CEMAFON key data 2011 / world industry spotlights 2011**

➤ Production volume 2011

➔ 2.3 billion Euro

➤ Employees

➔ 10.000

➤ Number of companies

➔ 170

➔ 200.000 Euros /
employee

➤ World metal casting production

➔ 98,593,122 million tons

➤ World motor vehicle production

➔ 79,989,115 units

➤ World crude steel production

➔ 2,981 thousand tons

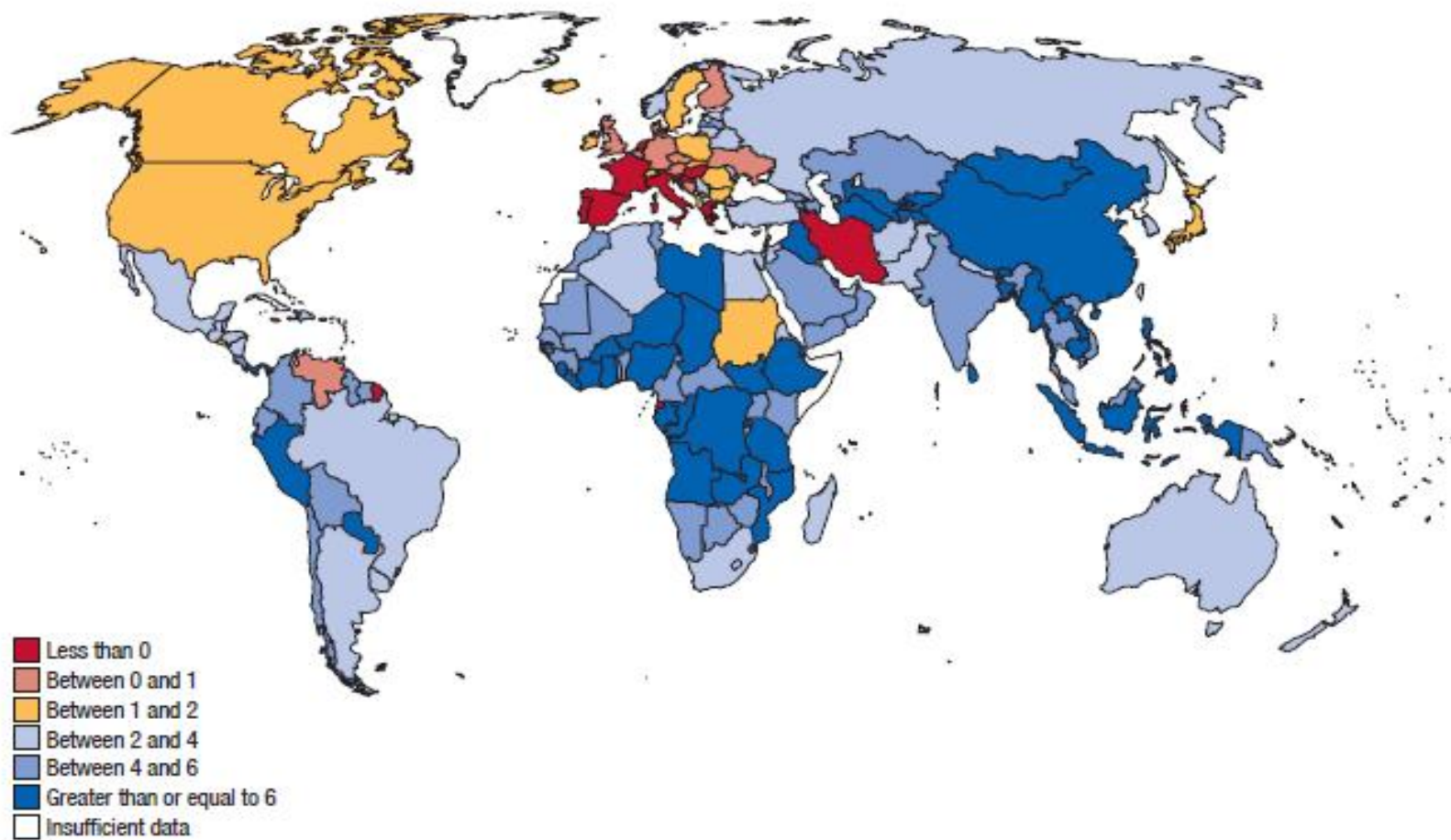
➤ World machinery turnover

➔ 2,050 billion Euros

*) Estimate based on export data, assuming a production / export ratio of 50%

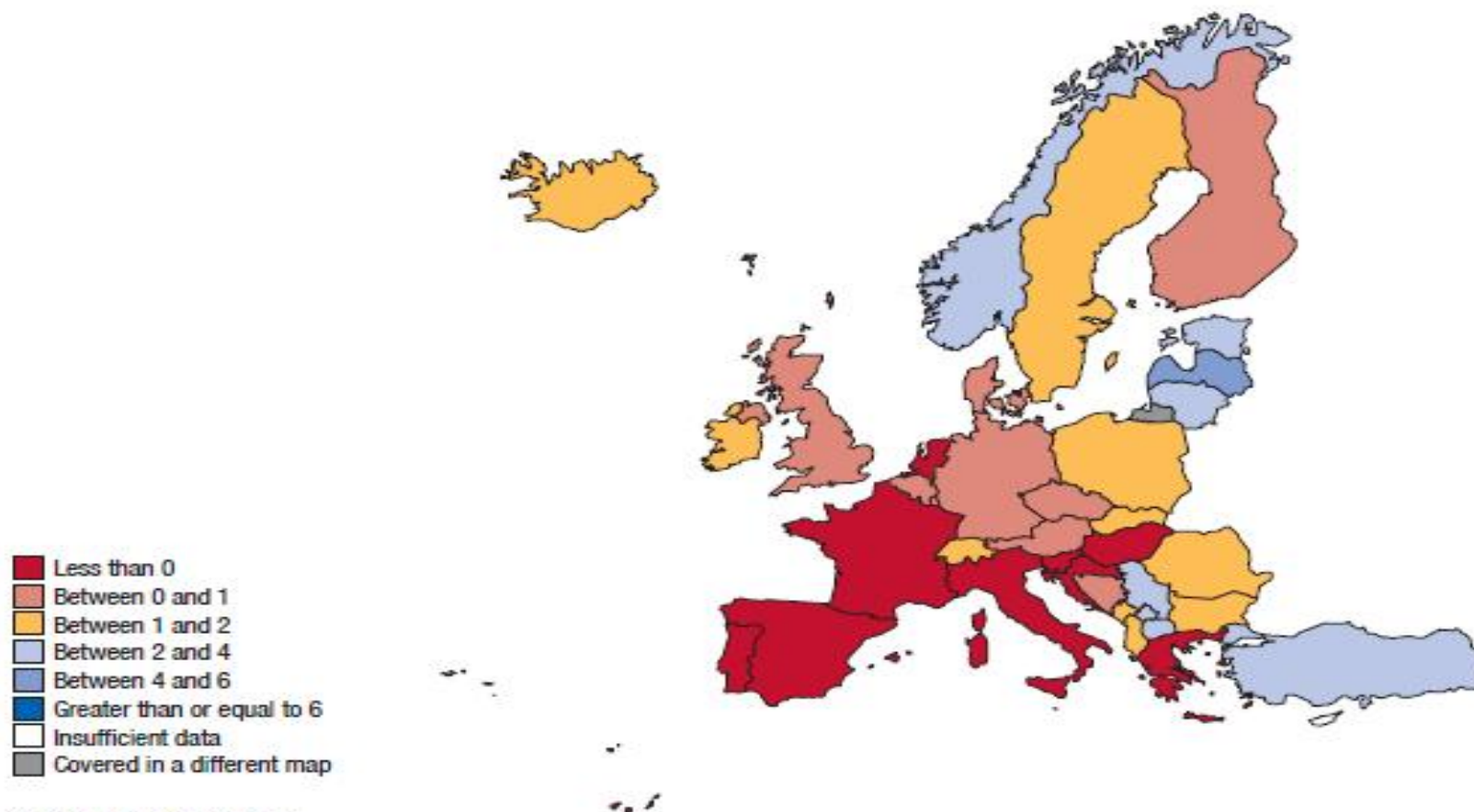
**) Modern casting / 46th World census; OICA; Worldsteel Association; VDMA estimate

World: 2013 GDP Growth Forecasts



Source: IMF staff estimates.

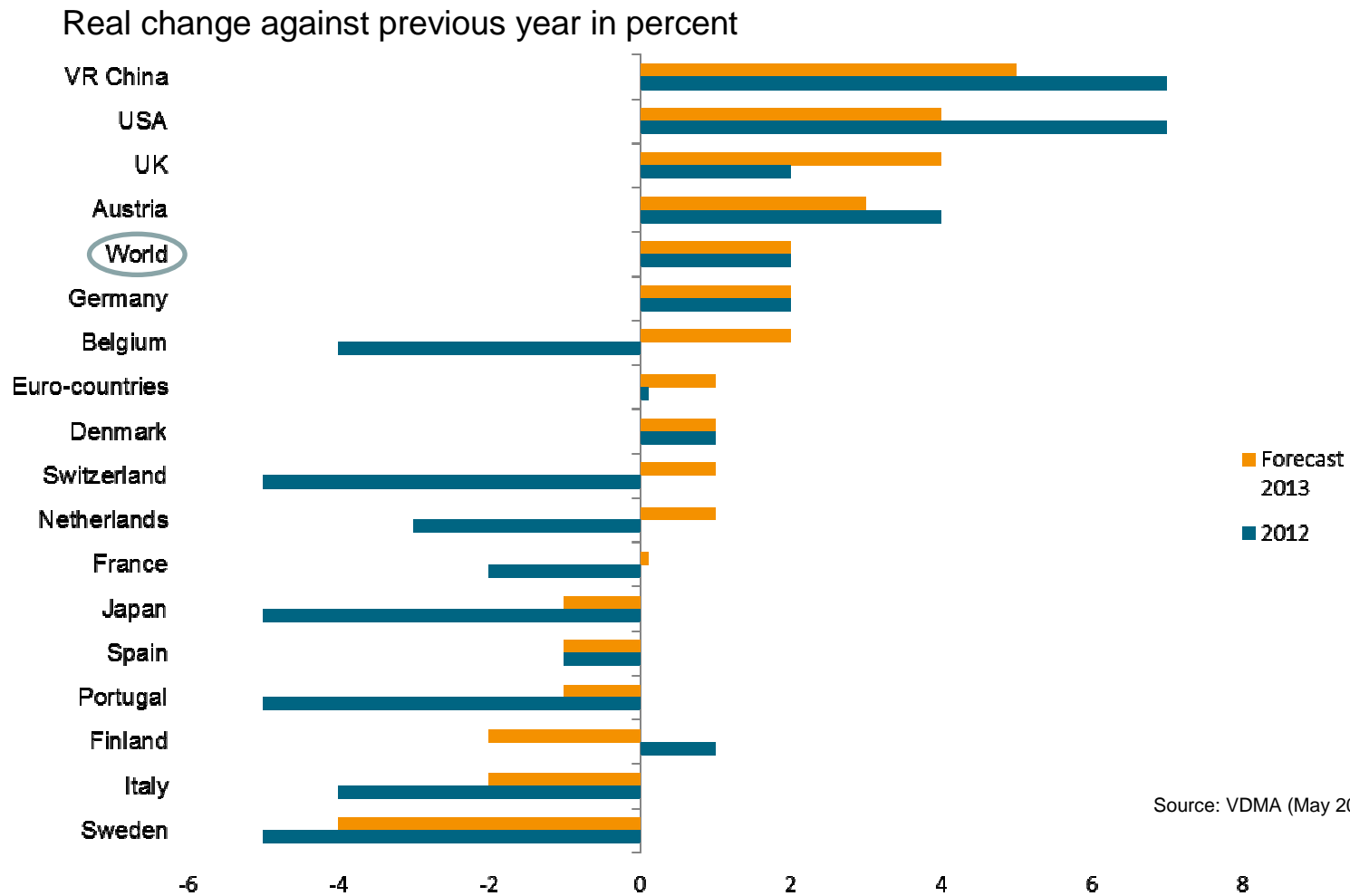
Europe: 2013 GDP Growth Forecasts



Source: IMF staff estimates.

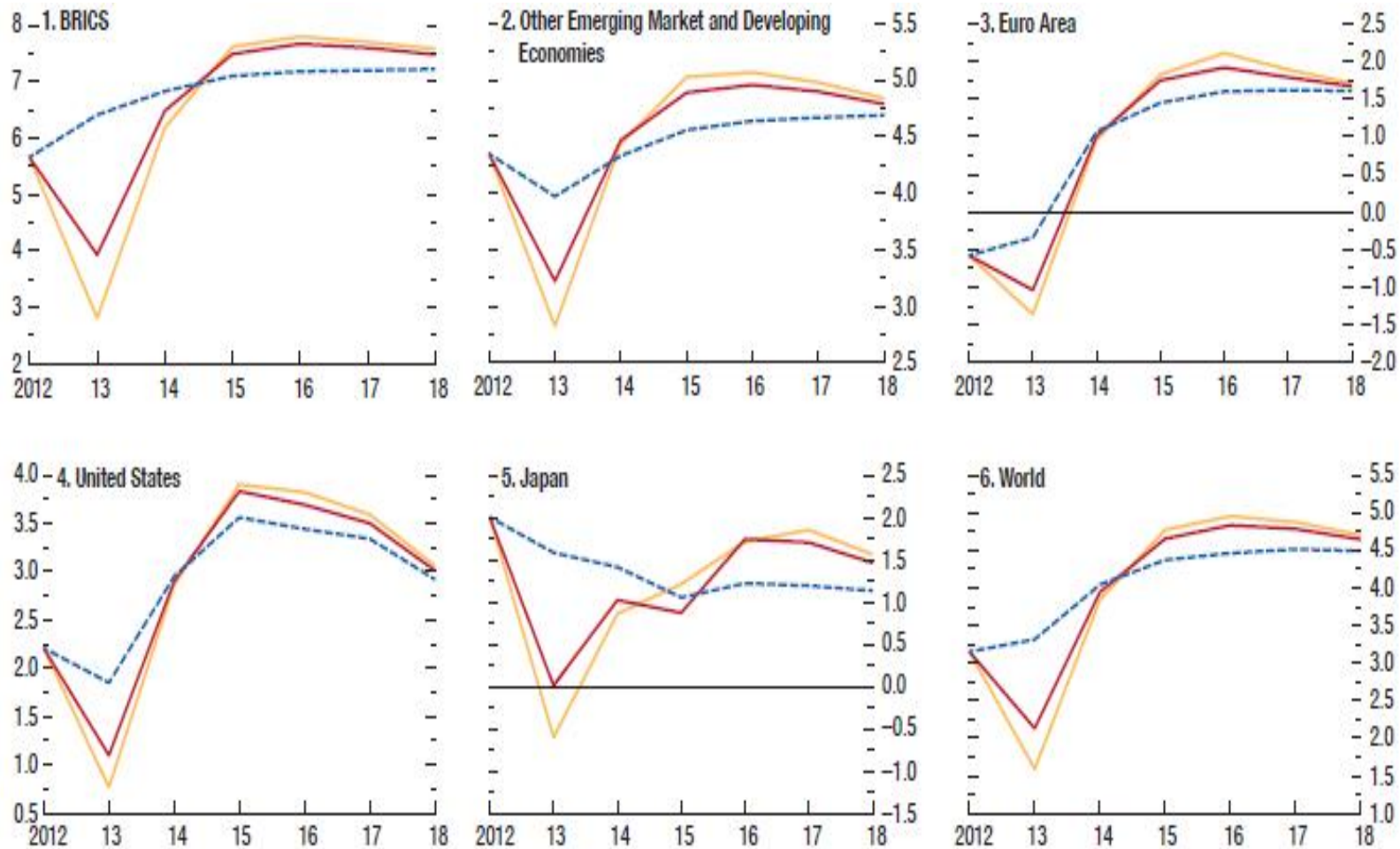
Note: Projections for Cyprus are excluded due to the ongoing crisis.

Turnover in international mechanical engineering

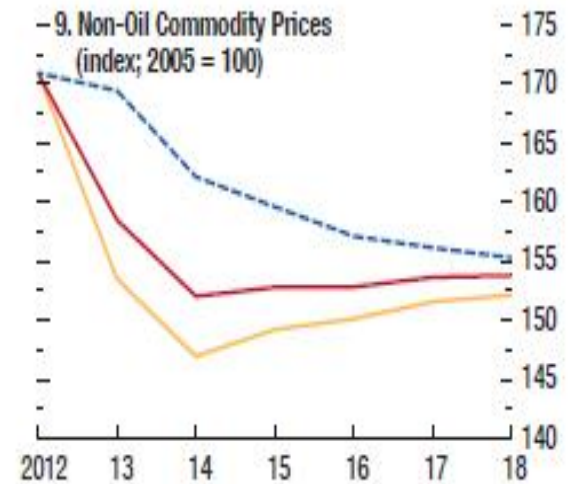
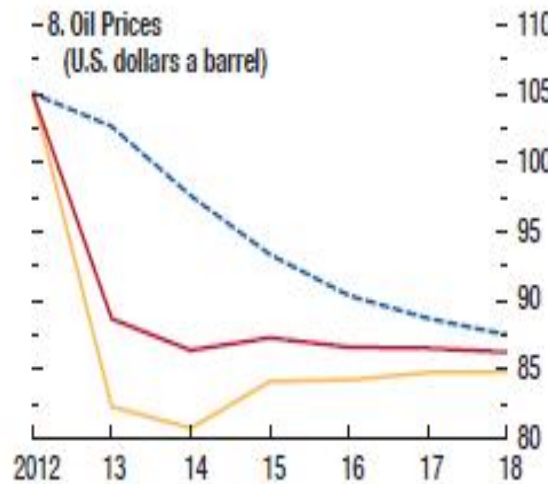


Source: VDMA (May 2013)

Real GDP Growth



Real GDP Growth



Development of main steel using sectors

Overview of main steel using sectors – EUROFER forecast April 2013

% change year-on-year in the SWIP (Steel Weighted Industrial Production) index

	% share in total consumption	Year 2012	Year 2013	Year 2014
Construction	35	- 5.0	- 1.9	1.2
Mechanical Engineering	14	- 0.9	- 0.9	4.0
Automotive	18	- 3.2	- 3.7	2.4
Domestic Appliances	3	- 1.5	0.3	3.1
Other Transport	2	- 0.3	5.2	4.9
Tubes	12	- 6.1	- 1.7	2.4
Metal Goods	14	- 2.5	- 0.3	3.7
Miscellaneous	2	- 1.9	- 0.3	3.1
TOTAL	100	- 3.6	- 1.5	2.4

Automotive – the driving force

From developed and special developing countries we will see a strong growth in the demand for consumer products, vehicles, communication, IT,...

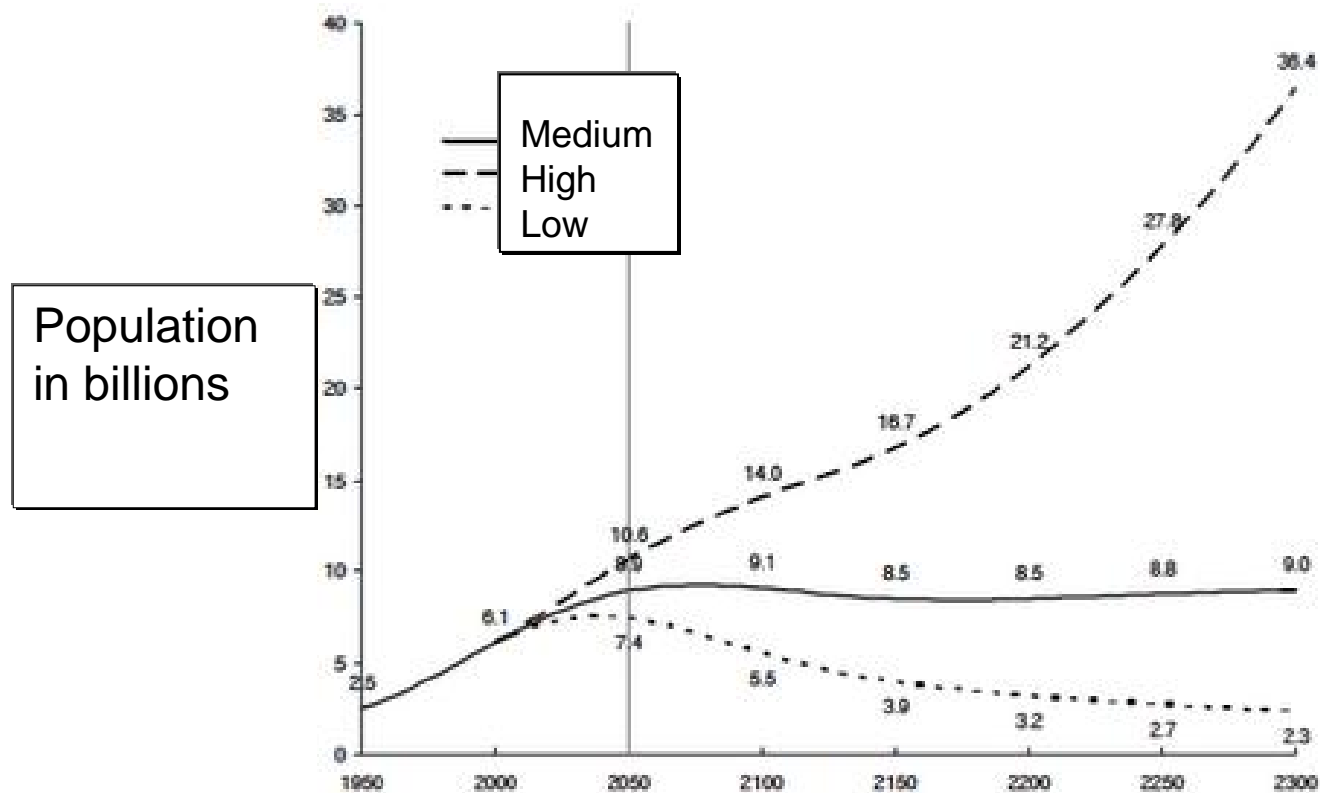
Light vehicle production by region (in units), 2007 – 2014

Source: J.D. Power and Associates

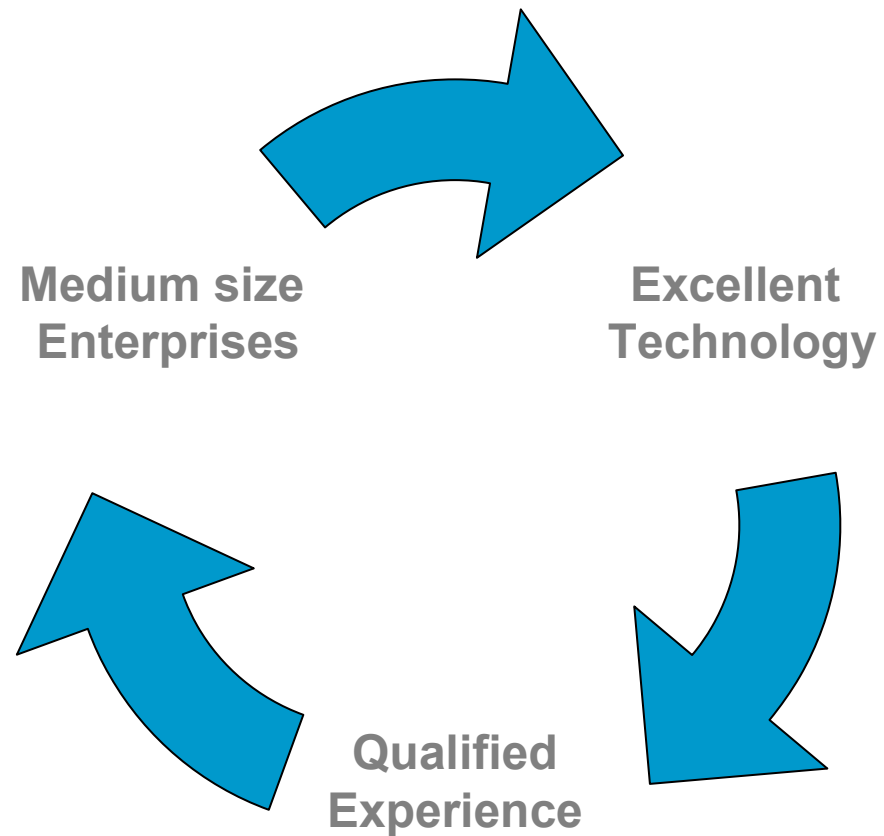
	2007	2008	2009	2010F	2011F	2012F	2013F	2014F	Δ 09-14
Asia	27,889,116	28,333,805	28,846,146	31,794,698	34,210,699	36,526,521	38,172,449	39,561,154	10,715,008
North America	15,023,617	12,583,613	8,525,754	10,595,746	12,280,019	13,927,633	14,759,061	15,468,553	6,942,799
Western Europe	16,109,678	14,582,725	11,946,822	11,892,659	12,179,938	12,501,940	14,072,976	14,897,378	2,950,556
Central and Eastern Europe	5,978,025	6,367,050	4,739,247	5,269,842	5,769,352	6,497,232	7,314,985	8,009,410	3,270,163
South America	3,581,641	3,759,796	3,673,142	4,092,846	4,437,041	4,755,147	5,163,485	5,500,447	1,827,305
Middle East	1,126,521	1,183,087	1,343,704	1,395,552	1,602,405	1,779,340	1,953,593	2,076,379	732,675
Africa	559,785	565,535	397,493	503,400	590,832	717,859	785,450	813,835	416,342
Other	155,796	196,000	198,000	552,000	940,000	967,000	996,000	786,000	588,000
Grand total	70,424,179	67,571,611	59,670,308	66,096,743	72,010,286	77,692,672	83,217,999	87,113,156	27,442,848

To participate as supplier in the future **Quality + Productivity + Energy efficiency** are key figures !

Estimated world population: 1950-2000 and projections: 2000-2300



Why are the CEMAFON companies strong?



Thank you
for your attention !